

CADRE Search Checklist**Search Tips:**

1. Before starting a search develop a **search strategy**.
2. Conduct an initial search, look at results, determine what is relevant/non-relevant, and refine the search. It is best to start broadly and narrow down as you go.
3. Assume there are typos and misspellings in keywords, titles, etc. Search on multiple and variations of keywords, names, etc.
4. As you peruse the request (both initial and refs/coords) for the second time, write down keywords. Write these words and other notes (e.g. fee waiver requests, etc.) on your worksheet.
5. Look at **ALL** results and verify them. Make notes on your requester report for each decision.
6. Search **ALL** attachments in a document.
7. Search associated cases when you get hits on documents.
8. If unsure about a topic, also search on dates.
9. Make wildcards a routine part of a search.
10. Use documents in similar cases to try and find other cases.
11. Go through all documents as necessary. You can eliminate documents by subject and release codes.
12. Check for EO and Privacy cases as well.
13. Note who was tasked in previous requests on the same or similar subjects.
14. Note all release decisions and any instances of non-attribution.
15. When searching a name, consider the first and last name as separate entities. Do a broader search (e.g. last name) to begin with.

Questions to consider when searching:

1. Are there other documents on the subject, or the same documents, in non-related cases?
2. Is there a previous case that exactly matches the new request?
3. Is there a previous request with the same subject?
4. Look at dates of previous searches. Is there anything likely to appear after those dates? (If it is a big topic, i.e. Bay of Pigs, why start a new search.)

Initial Requests:

1. Search Requester History and Fees
2. Run Case History search
3. Run Case Subject search
4. Run Case Keyword search
5. Run Document Title search
6. Run Document Keyword search
7. Run Internet search (when appropriate)
8. Run Full-text search (when appropriate)
9. Print out all search results (except for information on frequent requesters) and put into the hardcopy file.

Refs/Coords:

(b)(3)

1. Search Requester History and Fees
2. Run Case Subject search
 - Look at the request itself first and documents second.
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3. Run Case External ID search (when appropriate—when more than one referral on the same topic)
4. Run Document Title search
5. Run Document Keyword search
6. Run Document Publication Date search
7. Run a Full-text search (when appropriate)
8. Print out all search results (except for information on frequent requesters) and put into the hardcopy file.

National
Security Act**Requester Report:**

1. Run Requester Report(s) on Document Keyword/Title
2. Print out all reports.

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